AGENTFORCE AGENT · INDUSTRY AGENTS · NOVEMBER 2026

Loan Document Collector Agent

Tracks the document checklist for a loan application, asks the applicant for missing items.



STATUS
COMING SOON

WORKS WITH
Talks to customers

WHERE IT WORKS
Customer portal, SMS, Email

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Loan Document Collector Agent takes off your team.

WHAT IT DOES

A customer-facing agent that tracks the document checklist for a loan application, asks the applicant for missing items, confirms receipt and notifies the loan officer when the file is complete. It does not assess credit, quote rates or make or imply any lending decision.



WHO USES IT Loan applicants, loan officers, processors, underwriters and branch managers

WHAT IT DOES

Everything the Loan Document Collector Agent handles.

01

Checklist status

Show what is received and missing to an authenticated applicant.

02

Collect documents

Send the secure link and confirm receipt.

03

Reminders

Scheduled reminders for outstanding items.

04

Handoff

Pass the complete file to the loan officer and escalate sensitive cases.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 The agent never makes, implies or hints at a credit decision, approval likelihood, interest rate or product recommendation.

02 The agent never collects ID numbers, full account numbers or card numbers in chat. Documents are uploaded only through the secure link.

03 Do not use the agent with real applicants until your legal and compliance team has completed a privacy and regulatory review.

04 No application data is shown or changed until the session is authenticated (Experience Cloud login or one-time code).

05 Mask sensitive values in chat and logs using Einstein Trust Layer data masking.

06 Escalate financial hardship, vulnerability, complaints and fraud concerns to a human immediately.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

Deployable source
The agent, actions, objects and screens as Salesforce metadata.

Solution design
A Solution Design Document with UML for your architects.

Test suite
Apex tests plus replayed conversations, run before every release.

Least-privilege access
Permission sets for the agent user and for your staff.

Runbook and handover
How to run it, change its rules and roll back.

YOU PROVIDE Financial Services Cloud or an equivalent application object, plus Experience Cloud and Agentforce. · Your legal and compliance sign-off, privacy impact assessment and data retention rules; checklists by loan type.

NEXT STEP

Get the Loan Document Collector Agent scoped for your org.

A free 60-minute review with an architect: what it would do in your org, what it needs and how long it takes.

EMAIL

contact@synconai.com

THE AGENT

synconai.com/ai-agents/loan-document-collector-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER